Financial Reporting for Private Equity

Case Study

Learn how Axis designed a mobile-ready app that gives private equity investors a 360° view of their portfolio performance.

CHALLENGE

How can we provide private equity investors with deeper insights across their entire portfolio?

In the fast-moving world of private equity, investors often face the challenge of how to quickly assess performance by investment, by fund or across an entire portfolio. Oftentimes, investors end up relying on dozens of individual reporting solutions that are inconsistent and present limited insights.

Our client, a PE investment administrator, wanted to present all of its clients' performance information in one place. Its investors are data-hungry, and demanded a highly usable, mobile-ready app that let them answer their own questions about performance and fees wherever they were.

When our client wanted to design a world-class data app to satisfy its demanding customers, they called Axis Group.

APPROACH

Axis designers talked with PE investors to understand what data really mattered to them.

With our user-centered approach, our designers uncovered the questions and data that were most important to our client's customers.

One of the key design considerations we uncovered was that PE investors need to be able to retrieve underlying detail at any time so they can address underlying performance issues quickly. We designed the app so users can drill into the details underlying any data point on performance or fees, at any level of detail.

The resulting data app presents users with a premium mobile experience that gives a single view into performance, fees and analysis across their entire investment portfolio.

PERSONA 1

Portfolio Manager

Business Goals:
1. Drive investor returns
2. Identify opportunities for growth
3. Identify ways to reduce costs
4. Maintain and extend client relationships

PERSONA 2

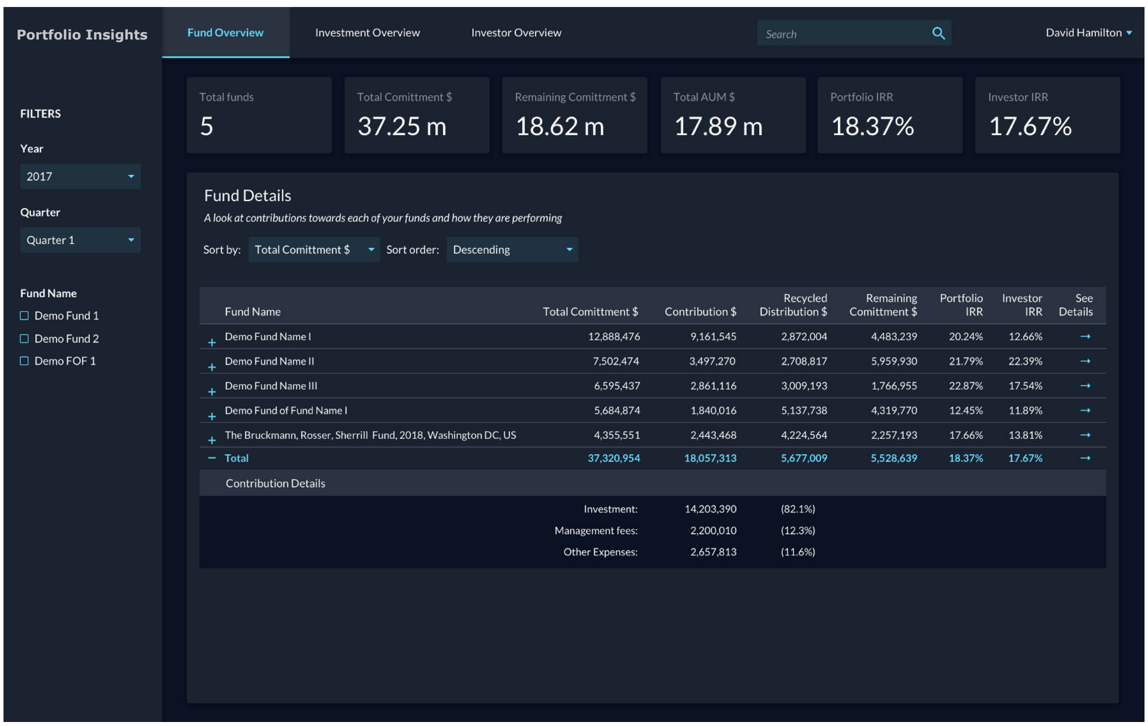
Investment Manager

Business Goals:
1. Manage investor relationships
2. Oversee the investment process
3. Analyze investor and fund performance
4. Answer investor questions

SOLUTION

A custom, mobile-responsive dashboard that unifies information across funds, giving both high level performance metrics and details when required.

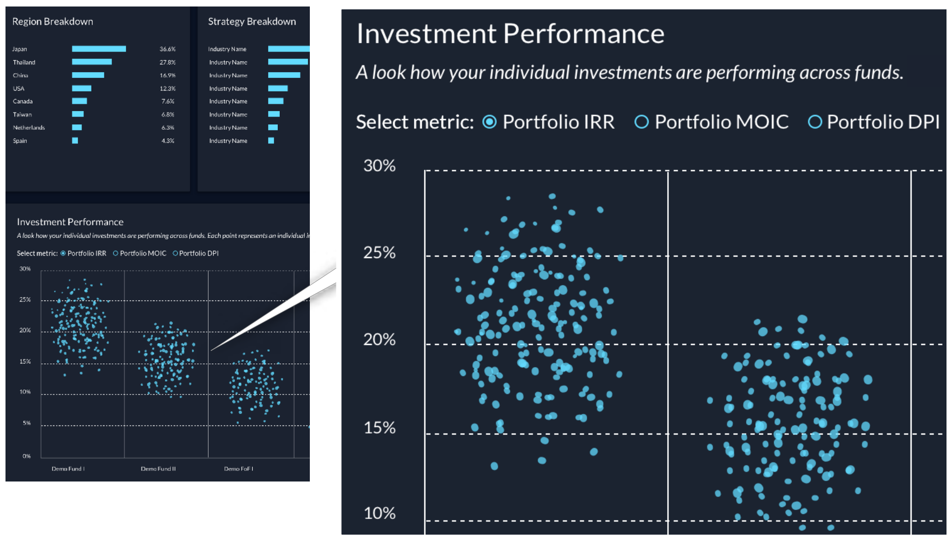
Portfolio overview and details on demand



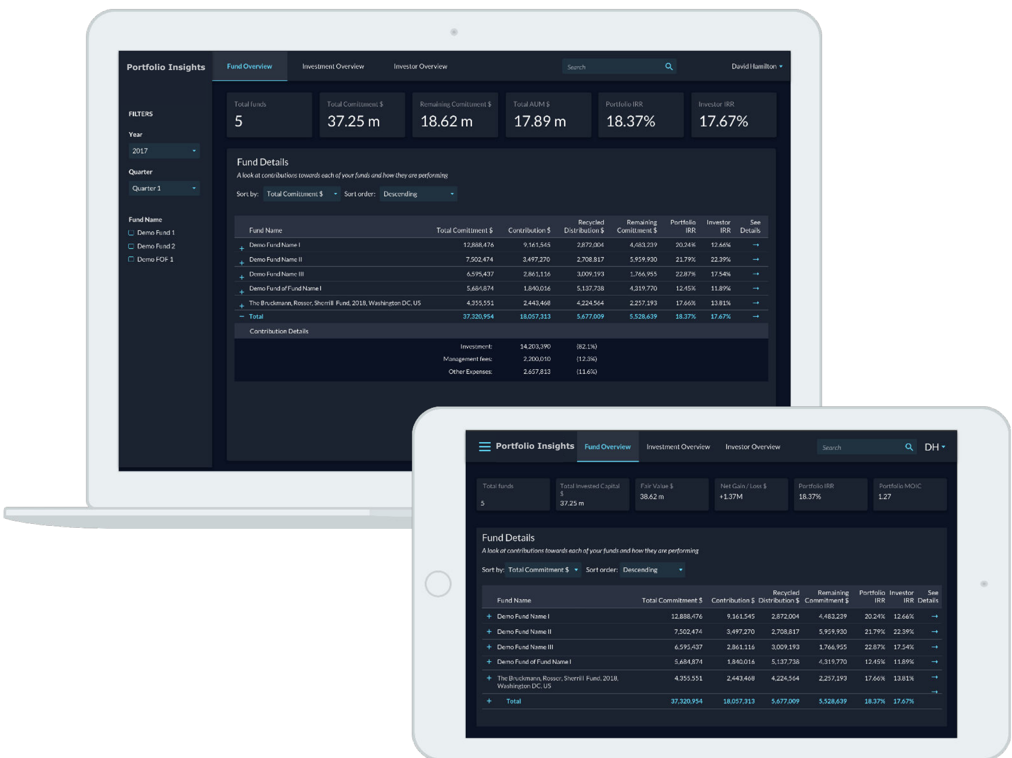
The app makes it simple for clients to answer their own questions about funds, investments and investors, and gives them instant access to portfolio performance measures. Detail tables can be expanded to expose more information about their investments without requiring the user to switch context.

Investment Overview

The app gives clients insights into how investments are performing across every portfolio, while also permitting them to drill into any particular data point, such as performance and management fees.



A strip plot gives clients a sense of how every investment in a fund is performing and lets them quickly identify outliers that need immediate attention. It also allows clients to change metrics and spot groupings of investments with similar performance.



Responsive Layout

We designed the app to be responsive, so users can seamlessly switch to mobile devices and explore data on-the-go. Even on tablets, investors can drill into details on their fund and portfolio performance.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